



In Search Of..... - ENERGY STAR Qualified CFL Market Share

**National Retailer Data and the National Lighting
Tracking Feasibility Study**

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Importance of ENERGY STAR Market Share Data



- Key benchmark to determine the success of the national ENERGY STAR program over time.
- Indicator of the success of regional programs and promotions.
- Proof of the cost effectiveness of public funds programs for regulators and policymakers.
- Evidence for manufacturers and retailers of the progress and success of energy efficient product penetration.

Reasons for CFL Tracking Focus



- Substantial ENERGY STAR partner expenditures to promote qualified lamps and fixtures. Utilities and energy efficiency organizations spent over \$55 million in 2002.
- Limited availability of retailer sales data when compared to ENERGY STAR appliances.
- Existing national partnership relationships with leading CFL retailers.
- Desire for replacement strategy for collecting regional sales data.

Beneficiaries of CFL Market Data



- Utilities and energy efficiency organizations needing metrics to track program impacts.
- Retailers and manufacturers looking for overall market information.
- National ENERGY STAR program.

Importance of National Retailer Data



- Nationwide coverage of sales allows aggregation of results by:
 - Region
 - State
 - Utility territory
- Centralized and more advanced data collection systems.
- Greater coverage of total lighting market.

Progress of National Retailer Data Collection



- Currently have limited national qualified CFL data - but not enough to release or aggregate.
- Need at least three retailers in all regions to release sales data.
- Coordinating with national retailers to finalize data collection.
- Hurdles we are jumping over:
 - Willingness of retailers to participate
 - acquiring data at a specific enough level to allow all local and regional analysis
 - ENERGY STAR qualified and total lighting sales by store, wattage, model number/UPC number, bulb type

Impetus for the Feasibility Study



- Need of energy efficiency program administrators and organizations to document the market penetration of energy efficient lamps and overall program successes.
- Need to identify new methods of data collection due to changes in national market research firm submissions.

Feasibility Study Conclusions



- Retailer point-of-sale data is key for the necessary market penetration tracking.
- Data by UPC code or model number is necessary to track all necessary characteristics:
 - Wattage
 - Lumen Output
 - Lifetime
 - Bulb Type
- Data should be obtained at the smallest geographic region possible, either ZIP code level or store level.
- Data should ideally be obtained quarterly.
- Ideal scenario is national retailer data combined with local retail tracking services such as ACNielsen and Vista.

Next Steps



- DOE is reviewing the feasibility study and will provide feedback to the authors along with recommended future activities.
- Coordination with national retailers will continue to collect accurate qualified CFL sales data
- Once all of the data consistency issues are resolved, ENERGY STAR will release a market share report.